APPROVING REQUISITIONS

Approval Workflow

Requisitions are created in PeopleSoft initiating requests to purchase commodities, printing, and services, which detail the purchase descriptions, quantities, justifications for the purchase, accounting information, and shipping addresses.

Each Business Unit has defined a workflow approval route that each request must follow, in addition to any external approvals (such as IOT, Budget Agency, etc.) that may be required based on the type of purchase. After the requisition is created and saved successfully, it's electronically submitted into workflow by the requester.

Designated approvers will receive email notification indicating that a user has submitted a requisition requiring approval. Below is an example of the email message.

Jane Doe-300 has entered a requisition that requires your approval. Following is a summary of the requisition details and justifications. Please click on the link below to navigate to the approval page.

Approval Rule Name: SOI_VEHICLE

Business Unit: 00300 - Dept. of Natural Resources
Req Id: 0000005834
Req Name: 802 BLOOMINGTON FORD
Req Date: 2006-02-23
Requestor ID: J005554 – Doe, Jane-300
Submittor ID: J005554 – Doe, Jane-300
Dollar Amount: $19148.00

Justifications:
1) Intended use of the vehicle, function to be performed in its daily job.
Vehicle will be used by the District 2 Wildlife Biologist to inspect wildlife damage and habitat sites, travel to meetings, run wildlife surveys and other duties.

2) Average monthly mileage of official use.
Approximately 1,500 miles

3) Vehicle type requested and what is needed to perform functions of the job.
Jeep Liberty, 4x4 to enable off road access to properties and a SUV to be able to carry a variety of necessary equipment protected from the weather.

4) Funds budgeted for vehicle purchase or lease.
For vehicle purchase at $20,000.

5) Does it replace an existing vehicle or add to the State fleet?
This vehicle will replace and existing 1998 Jeep Cherokee 4x4 (Comm# 14026).

6) Consideration of consolidating vehicle use. Can one vehicle be used to accommodate two or more needs?
This vehicle will be used for both on and off road daily travel in the performance of the duties of the District 2 Wildlife Biologist

7) Extending the useful life of vehicles. Motor Pool requires 100,000 miles for replacement unless mechanical problems require the vehicle to be replaced earlier.
The vehicle being replace has over 114,000 miles.

https://financial.gmis.in.gov/psp/fsprd/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_WF_REQ_APPR.GBL?Page=PV_WF_REQ_APPR&BUSINESS_UNIT=00300&REQ_ID=0000005834&RuleID=SOI_VEHICLE&Step=1

The approver receiving the notification email message may access the Approval page offering the requisition information and buttons for approval/denial of the requisition through the link provided in the message text. Each request submitted should also be available for review and approval/denial through the approver's worklist.

The following instruction outlines the steps for accessing the approver worklist, and completing the review and approval/denial.

Review Items in Work List

Once you have logged into PeopleSoft, find the four links in the top right corner of your screen (Home, Worklist, Add to Favorites, and Sign out). **Click on the Worklist link**. (You may also use the link in the e-mail notifying you of the required approval.)

> The Worklist page will open presenting a list of requisitions to be approved or denied. The Link column will display the Business Unit and Requisition ID of the items routed, and the From column will list the name of the user submitting the request.

Choose an item from the worklist to review and click the Req ID listed in the Link column.

> Approval roles may be *SHARED* by multiple users. If a particular requisition is not displayed in the worklist, it's possible that another approver in the same role has completed the approval action, or the requisition has not yet been submitted.
>
> If necessary, check the status of the requisition at eProcurement > Manage Requisitions. (Also, see Quick Reference Guide, Finding the Status of Your Purchase.)

The Requisition Approval page will open displaying information about the purchase request, including the requisition date, requester name, requester email address, and justification for the purchase.

Click the View Request Details link (towards the center of the page) to review the item description(s), quantities requested, estimated costs, and accounting information assigned to the purchase.

Click the Return to Previous Page link to return to the Requisition Approval page.

Complete the Approval/Denial

After review of the purchasing request and requisition information, it may be approved or denied.

When approving a requisition, the approver is not required to enter information explaining the approval, but may do so if desired in the Comment field. When denying a requisition, however, an explanation for the denial must be entered in the Comment field.

To approve the purchase, click the Approve button at the top of the page.

To deny the purchase, enter the reason for the denial in the Comment field and click the Deny button at the top of the page.

Repeat the outlined process by starting the process over by clicking the Worklist link again for other existing Worklist entries, or as needed when notified of new items requiring approval.

Additional Details and Options

Individual approvers within the workflow set-up may only have interest in information specific to their assigned approval role, but some may also have interest in the approval history, including actions and comments made by others in the approval cycle. To see the whole picture of the approval process for a requisition, it is helpful to know who else will be approving or has already approved it. All of this information is easily accessible to the approver from the approval panel. The

The Worklist...

The Worklist, as displayed, will indicate which approver previously reviewed this request in the From column. If the request has not yet been reviewed by another approver, the requester name will be listed.

The Date From field displays the date that the item was sent to the approver worklist to assist in tracking the amount of time required for approvals to be completed.

Reassign a Specific requisition for Approval by another user

In certain circumstances, the approver receiving the request may choose to assign the approval action for a specific requisition to another user. This can be accomplished from the Worklist by clicking the Reassign button at the end of the row that displays the requisition. A new page will open requiring that the User ID of the person to receive the assignment be entered, as well as comments regarding the reassignment. To assign all approvals for a specific amount of time see reassigning your approval authority section at the end of the document.

Rule ID...

After clicking on the link, you come to the Approval panel. At the top left of the screen, you'll find the 'Rule ID', which explains why you were included in the approval chain. However, it is possible that one person might fill multiple approval roles. If that is the case, only the first role will be displayed, but all of them will be taken care of when 'Approve' is selected.

Requisition Status...

Under the "Approve" and "Deny" buttons, you will see the "Requisition Status" and the "Approver Action". The requisition status will say "Pending Approval" and will only change upon your approval if you are the last person in the approval chain or if you deny the requisition. The approver action will say "Pending" until you choose to approve or deny the requisition.

Comments...

The comment box is available for you to record any message or note that you would like to have attached to a particular requisition. This is an optional step if you are approving the requisition, while it is mandatory if you deny it. Any comments must be added *before* clicking "Approve" or "Deny".

Adding Approvers...

As an approver, you may add other PeopleSoft users as approvers or reviewers for a particular requisition. To do this, simply select "approver" or "reviewer" and type the user ID of the person you would like to add to the workflow. If you select "approver", that person will be required to take action (approve or deny). However, if you select "reviewer", the person added will be able to see all that you see as an approver but will not be required to take action. They would not even have to look at the requisition in order for that document to be fully approved and carried forward in the purchasing process.

Approval Workflow…

Before deciding to add someone to the approval workflow, you must know who is already involved. To see the list of necessary approvals, click on the yellow triangle next to "View Approval Comments/History". This will display all of the required approvals and who will take care of each step. In some cases, instead of naming one particular person, you will see "Multiple Users". Once you have seen the approval workflow map, you can click on the yellow triangle again to collapse this section.

Requisition Information…

The Requisition Information section displays the Business Unit, Requisition ID, Requestor ID, and the Requisition Date. This section also shows the Business Unit Name, Requestor Name, and e-mail address in case contact with them is necessary before approving. Below all of that is the justification for this requisition, which should explain the necessity of this purchase.

Attachments…

You've already seen what can be found through the View Request Details link. Above that link, there may occasionally be a paper clip icon. This will display any attachments that have been added to the requisition electronically. Some users may opt to attach specifications in hard copy, which means that you cannot review them through PeopleSoft. If your decision to approve or deny a requisition depends on the specifications and they are not attached electronically, you will need to contact the requestor for a hard copy.

Requisition History…

At the bottom of the approval panel, there is a section titled "Requisition History". This is a list of all of the comments entered and actions taken for this requisition thus far. Here you will find the justification listed each time the requisition was saved, as well as evidence of editing, cancellation, reopening, other approvals, and any other comment someone might have chosen to add along the way.

Editing the Requisition…

The last function available to you is the Edit Requisition link at the bottom of the approval panel. If you choose, you may click this link to make changes to the requisition instead of denying it and giving instructions to the requestor as to what should be amended. For questions about how to find and edit information on a requisition, you may contact Kathy Evans or Brian Woods in IDOA Procurement Division.

Reassigning your Approval Authority

As an approver you have a responsibility to ensure that purchases can be processed in a timely manner. If you are the only person that fills a particular approval role, this means that you need to delegate your approval authority to a responsible party in your absence. It is up to your discretion to decide when it is necessary to delegate and to whom you should give your authority. The only stipulation is that the person chosen must have a current PeopleSoft ID.

Menu Navigation:

- eProcurement
  - My System Profile

At the bottom of the profile panel, there is a section titled “Alternate User”. In the “Alternate User ID” field, enter the PeopleSoft User ID for the person to whom you are temporarily delegating your authority.

> If you are unsure of their ID, you may click on the magnifying glass to search. The fastest way to search is by typing the first letter of the person’s first name next to “User ID begins with”. This will bring up a list of all PeopleSoft users with a first name that starts with that letter. You should be able to scroll through the list to find the person you are looking for. It may be helpful to click on the Description link at the top of the results column. This will sort the list in alphabetical order by last name. Once you have found the right person, click on that ID to return to the profile panel.

Next, you will need to indicate the effective date range for this delegation. You may type the dates in the boxes or select them from the calendar by clicking on the calendar icon 📅.

> IMPORTANT: All requisitions submitted before 12:00am on the “From” date will still be routed to you. It is best to delegate your authority at the end of your last day in the office, and enter that date as the “From” date. No requisitions will move from one worklist to another. This delegation of authority only applies to requisitions submitted within the effective date range you select.

Once you have completed these three fields, click the Save button at the bottom of the page.